



Government of the District of Columbia

Anthony A. Williams, Mayor

State Education Office

Strategic Business Plan

FY 2004-2005

State Education Office

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Agency Mission

The mission of the State Education Office is to provide research, policy analysis, financial aid, food, and other education-related services to District youth, families, stakeholders, and decision-makers so that there is an equitable distribution of resources and opportunities to make informed decisions, enhance their nutrition, and improve educational accountability and performance.

Issue Statements

Issue Statement #1: The perceived lack of access to nutritional services coupled with the lack of infrastructure and capacity, challenges the SEO to design and implement collaborative strategies that insure complete compliance and engage critical stakeholders in resolving the problems of hunger in our city.

Issue Statement #2: The lack of capacity and infrastructure limits SEO's ability to develop integrated business processes and information technology systems, which in turn impedes our capability to successfully fulfill legislatively mandated state-level functions (i.e., audit of student count, residency verification, research, uniform student funding recommendations).

Issue Statement #3: The compelling District requirements for timely, reliable, accurate, and comprehensive educational data requires SEO to analyze data from various sources and produce information useful for decision-makers.

Issue Statement #4: The existence of multiple local education agencies (LEAs) requires SEO to address a range of education policy issues at the city- wide level.

Issue Statement #5: The essential requirement for a highly marketable workforce to support economic stability dictates the need for a complete range of postsecondary education and training opportunities for all D C residents.

Issue Statement #6: Citizens' expectations of problem resolution and new responses regarding the Mayor's number one priority (i.e., education, children, youth, and families) require high capability and quality research and analysis by SEO.

Strategic Result Goals

Strategic Result Goal #1

- Increase documented participation and expand services in federally funded nutrition programs by identifying 80% of eligible participants by FY 2004 and 95% of eligible participants by FY 2005.

Strategic Result Goal #2

Ensure citywide accountability for all public school student enrollment counts by completing:

- Timely and accurate fall enrollment audits/samples as needed each year to improve the accuracy of school counts;
- Periodic residency verification rule-makings required to ensure all out-of-district students are identified and properly charged for educational services; and
- Recommendations to the Uniform Per Student Funding Formula for the School Years 02/03 and 04/05.

Strategic Result Goal #3

- Ensure the successful transition of all new and future legislatively mandated state-level functions by having an integrated and fully functioning information system in place by FY 2004.

Strategic Result Goal # 4

- Continue the expansion of educational research and data analysis capacity so that by FY 2004, 95% of survey participants report that they received the information they wanted and needed, and that the information that they received was accurate, thorough, easily accessible, and timely.

Strategic Result Goal # 5

- Increase the amount of post-secondary financial assistance opportunities available through SEO to residents of the District of Columbia so that 85% of eligible recipients are served. (i.e. know about financial assistance opportunities available to them) by FY 2005.

Strategic Result Goal #6

- Increase the participation of residents and key stakeholders in the ongoing planning, decision-making, and development of the State Education Office so that by FY 2004 all interested parties have been afforded a structured opportunity to participate in various SEO public processes.

Strategic Result Goal #7

- By the end of 2004, 100% of SEO employees will have received the specialized training they need to do their jobs.

Program and Activity Structure

PROGRAMS

- I. Policy Research and Analysis
- II. Educational Licensing and Certification
- III. Customer Services
- IV. Nutrition Services
- V. Higher Education Financial Services
- VI. Agency Management Program Services/Operational Services

I. PROGRAM: POLICY RESEARCH AND ANALYSIS

A. ACTIVITY: Policy Research and Analysis

- 1) Service: Common Data Standards/Dictionary
- 2) Service: Website Information
- 3) Service: Studies/Publications/Research Monographs
 - In-house Research/Analysis
 - Contracted/Outsourced Research/Analysis
 - Existing Resources/Links
- 4) Service: Recommended Uniform Funding Formulae
- 5) Service: Residency Verification Rules
- 6) Service: Enrollment Count Audit and Report
- 7) Service 7. Answered Inquires
 - Public
 - Ad-Hoc Reports
- 8) Service 8. Dialogue Meetings/Convenings
- 9) Service 9. New Program Transition Plans

II. PROGRAM: EDUCATION LICENSING AND CERTIFICATION

A. ACTIVITY: Education Licensing and Certification

- 1) Service: New Operating Licenses
- 2) Service: License Renewals
- 3) Service: Application Packets
- 4) Service: Reviewed/Processed Applications
- 5) Service: Approval/Disapproval Letters
- 6) Service: Site Visits
- 7) Service: Administered Denial Appeals
- 8) Service: Complaint Investigations
- 9) Service: School Closeouts
- 10) Service: Enforcement Actions
- 11) Service: Educational Licensure Commission Support
- 12) Service: Conditional Exemptions (congressionally-chartered intuitions)
- 13) Service: Private Primary/Secondary School Report Reviews
- 14) Service: Private Primary/Secondary School Complaint Investigations

III. PROGRAM: CUSTOMER SERVICES

A. ACTIVITY: Customer Services

- 1) Service: Inquiry Responses

- Phone calls
 - E-mails/Website Requests
 - Mail
 - Walk-ins
- 2) Service: Phone Call Relays/References
 - 3) Service: Application Packets
 - 4) Service: Website Information/Pages/Interactive Services
 - 5) Service: Liaison/Ombudsman Services
 - 6) Service: PSAs, Press Releases, and Public Appearances
 - 7) Service: Scheduled and Ad-hoc Outreach Speeches and Presentations (to schools, churches, CBO's and others)
 - 8) Service: Outreach Events
 - 9) Service: Direct Marketing Materials/Mailings
 - 10) Service: Customer Satisfaction Surveys/Reports
 - 11) Service: Other Internal Administrative/Program Support Services (i.e. loaned staff)

IV. PROGRAM: **NUTRITION SERVICES**

A. ACTIVITY: **Nutrition Services**

- 1) Service: Reviewed Applications
- 2) Service: Pre-Award Site Visits
- 3) Service: Approved Agreements
- 4) Service: Processed Claims
- 5) Service: Payments for Reimbursable Meals
- 6) Service: Training Sessions/Courses
- 7) Service: Technical Assistance Contacts
- 8) Service: Oversight/Monitoring Site Visits and Reports
- 9) Service: Administrative/Compliance Reviews
- 10) Service: Federal Audit Assistance
- 11) Service: Ordered/Distributed Food Commodities
- 12) Service: Outreach/Marketing Meetings, Fairs, Press Releases, PSAs and Direct Mailings
- 13) Service: Nutrition Information

V. PROGRAM: **HIGHER EDUCATION FINANCIALSERVICES**

A. ACTIVITY: **Higher Education Financial Aid Services**

- 1) Service: Processed Applications
- 2) Service: Application Assistance
- 3) Service: Awarded Need-based (adoptive, L.E.A.P., T.A.P.I.T., grants)
- 4) Service: Awarded No-need Grants (T.A.G.)
- 5) Service: Contracted College Courses (for inmates)
- 6) Service: Professional Development Grants—(Eisenhower Grants to colleges for Math and Science teachers)
- 7) Service: ACT Exams
- 8) Service: Higher Education Statistical Reports (I.P.E.D.S.)
- 9) Service: Defaulted Loan Fund Collections

VI. PROGRAM: **Agency Management Program Services/Operational Services**

A. ACTIVITY: **Personnel**

- 1) Service: Workforce Plans
- 2) Service: Candidate Selection Recommendations

- 3) Service: Recruitment Plans
- 4) Service: Job Postings
- 5) Service: Job Analyses and Classification
- 6) Service: Personnel Policy Interpretations
- 7) Service: Personnel Policy Recommendations
- 8) Service: Legal and Regulatory Interpretations
- 9) Service: Personnel Policy and Procedure Updates
- 10) Service: Employee Complaint/Grievance Investigation Reports
- 11) Service: Grievance Hearings
- 12) Service: Employee Interviews
- 13) Service: Benefit Consultations
- 14) Service: Employee Inquiry Responses
- 15) Service: Organization Development Facilitations and Consultations
- 16) Service: Other

B. ACTIVITY: Training and Employee Development

- 1) Service: Training Classes, Seminars and Workshops
- 2) Service: Occupational Certification Sessions
- 3) Service: Computer-based Training Sessions
- 4) Service: Tracking System
- 5) Service: Internal Educational Consulting Sessions
- 6) Service: Employee Handbooks
- 7) Service: Training Assessments
- 8) Service: Program Management (Special Programs)
- 9) Service: Other

C. ACTIVITY: Labor Management Partnerships

- 1) Service: Labor-Management partnership action plans
- 2) Service: Labor-Management partnership best practices
- 3) Service: L-M Partnership Communication/Promotional materials (e.g. newsletter)
- 4) Service: Other

D. ACTIVITY: Contracting and Procurement

- 1) Service: Contract Preparation, Administration, Monitoring and Compliance
- 2) Service: Bid Requests/Recommendations
- 3) Service: Change Orders
- 4) Service: Technical Assistance
- 5) Service: Purchase Reports
- 6) Service: Other

E. ACTIVITY: Property Management

- 1) Service: Strategic planning
- 2) Service: Site Acquisition
- 3) Service: Lease Negotiations
- 4) Service: Lease management
- 5) Service: Lease administration
- 6) Service: Space planning
- 7) Service: Space Allocations
- 8) Service: Utility Management
- 9) Service: Fixed Cost Projections
- 10) Service: Security Services
- 11) Service: Emergency Response
- 12) Service: Relocation Support

- 13) Service: Facility Services
- 14) Service: Contract Management
- 15) Service: Postal Services
- 16) Service: Capital Construction
- 17) Service: Parking Services
- 18) Service: Facility Coordination
- 19) Service: Furniture Relocations
- 20) Service: Recycling Services
- 21) Service: Other

F. ACTIVITY: Information Technology

- 1) Service: Computer Installation, Repair, Upgrades and Preventative Maintenance Service Calls
- 2) Service: Computer Hardware/Software Support
- 3) Service: Programming
- 4) Service: LAN Maintenance
- 5) Service: Software Licenses and Upgrades
- 6) Service: Long Range Information Systems Plans
- 7) Service: Telephone Voice Mail Accounts
- 8) Service: Telephone Service Repairs
- 9) Service: Website Hosting and Management
- 10) Service: Email Accounts
- 11) Service: Other

G. ACTIVITY: Financial Services

- 1) Service: Agency Budget (Operating and Capital Grants, intra-District) Development and Monitoring
- 2) Service: Revenue and Expenditures Tracking Reports
- 3) Service: Revenue and Expenditure Estimates (FRP)
- 4) Service: Annual Financial Report
- 5) Service: Capital Project/Grant Closeouts
- 6) Service: Grant Management/Allocations
- 7) Service: Budget Variance Analyses
- 8) Service: Budget Change Requests
- 9) Service: Fund Certifications
- 10) Service: Activity Management
- 11) Service: Other

H. ACTIVITY: Risk Management

- 1) Service: Risk Assessments
- 2) Service: Risk Mitigation Plans
- 3) Service: Risk Reduction Policies
- 4) Service: Incident Analyses
- 5) Service: Risk Mitigation Plan Audits
- 6) Service: Other

I. ACTIVITY: Legal Services

- 1) Service: Legal Sufficiency Reviews
- 2) Service: Statutory & Regulatory Interpretations
- 3) Service: Audits
- 4) Service: Claims Reviews
- 5) Service: Legal Opinions
- 6) Service: Copies of Laws & Regulations

- 7) Service: Regulation Drafts
- 8) Service: Contract Reviews
- 9) Service: Consultations
- 10) Service: Research Opinions
- 11) Service: Liaisons to Office of Corporation Council (OCC)
- 12) Service: Other

J. ACTIVITY: Fleet Management

- 1) Service: Preventive Maintenance Schedules (PMs)
- 2) Service: Bid Requests
- 3) Service: Motor Pool Cars
- 4) Service: Long Term Vehicle Leases
- 5) Service: Vehicle Rentals
- 6) Service: Other

K. ACTIVITY: Communications

- 1) Service: Newsletters
- 2) Service: Informational Bulletins
- 3) Service: Informational Meetings
- 4) Service: New Employee Packages
- 5) Service: Internal Council/Forum Sessions/Meetings
- 6) Service: Media Request Responses
- 7) Service: Promotional Campaigns
- 8) Service: Posters, Brochures, and Newsletters
- 9) Service: Supported Special Events
- 10) Service: Speaking Engagements
- 11) Service: Media Outreach Services
- 12) Service: Website Content
- 13) Service: Workshops
- 14) Service: School Curricula
- 15) Service: School Patrols
- 16) Service: Freedom of Information Act (FOIA) Reports
- 17) Service: Congressional Inquiry Responses
- 18) Service: Council inquiry Responses
- 19) Service: Other

L. ACTIVITY: Customer Service

- 1) Service: Telephone Number Verifications
- 2) Service: Performance Data and Trend Analysis Reports
- 3) Service: Internal Quality Assurance Monitoring Services
- 4) Service: Agency Call Center Responses (Where Applicable)
- 5) Service: Agency Call Center Intakes (Where Applicable)
- 6) Service: Acknowledgment Letters to Constituents
- 7) Service: Letter Routing and Tracking Services
- 8) Service: Customer Service Technology System Installations
- 9) Service: Customer Service Technology System Training Sessions
- 10) Service: Customer Service Business Partner Sessions
- 11) Service: Customer Service Information Reference Materials
- 12) Service: Customer Service Public Service Announcements
- 13) Service: Delivery Schedules
- 14) Service: Customer Service Awards and Acknowledgements
- 15) Service: Agency-specific Customer Surveys

M. ACTIVITY: **Performance Management**

- 1) Service: Agency Strategic Business Plans (Biennial)
- 2) Service: Performance Contracts (Annual)
- 3) Service: Monthly Performance Reports
- 4) Service: Performance Accountability Plans (Incorporated Into Budget)
- 5) Service: Performance Accountability Reports to Council
- 6) Service: Scorecards
- 7) Service: Neighborhood Cluster Database

Program Purpose Statements and Results

Program 1 - POLICY RESEARCH AND ANALYSIS¹

The Policy Research and Analysis program primarily supports the Citywide Strategic Priority area of *Making Government Work*. The purpose of the Policy Research and Analysis Program is to provide accessible, reliable and accurate information to citizens and policy makers so they can make well-informed decisions about education in the District.

Key Result Measures:

- Percent of policy makers/key stakeholders/members of the public reporting they received the information that they wanted/needed (FY04 target: 85; FY05 target: 90)

Program 2 - EDUCATIONAL LICENSING AND CERTIFICATION

The Education Licensing and Certification program primarily supports the Citywide Strategic Priority area of *Making Government Work*. The purpose of the Education Licensing and Certification Program is to provide regulatory compliance services to non-public educational institutions and residents of D.C. so that educational institutions are legally enabled to meet the educational needs and requirements of D.C. residents.

Key Result Measures:

- Percent of site evaluations conducted (FY04 target: 85; FY05 target: 85)
- Percent of student complaints responded within 90 days (FY04 target: 90; FY05 target: 95)

Program 3 - CUSTOMER SERVICES

The Customer Services program primarily supports the Citywide Strategic Priority area of *Making Government Work*. The purpose of the Customer Services Program is to provide responses to inquiries, targeted outreach, information and marketing services to citizens of the District of Columbia so that they can increase their awareness of programs and services with high levels of customer satisfaction.

Key Result Measures:

- Percent of front-line customer contacts rated at the highest level (FY04 target: 80; FY05 target: 85)
- Percent of key stakeholders satisfied with the availability of information concerning SEO (FY04 target: 80; FY05 target: 85)

Program 4 - NUTRITION SERVICES

The Nutrition Services program primarily supports the Citywide Strategic Priority area of *Making Government Work*. The purpose of the Nutrition Services Program is to provide federal funding, compliance monitoring, technical assistance/training, and outreach/marketing information to the District public, private, and non-profit institutions and other organizations so that nutritional meals are provided to all eligible children and other recipients.

¹ The agency Key Result Measures reflect updates agreed upon during the FY 2005 budget development process. Please refer to the agency's budget chapter in the FY 2005 Proposed Budget and Financial Plan for details regarding specific Key Result measures.

Key Result Measures:

- Percent of eligible children participating in nutrition programs/receiving nutrition services (FY04 target: 75; FY05 target: 80)
- Percent of eligible children participating in the summer food service program (FY04 target: 60; FY05 target: 80)

Program 5 – HIGHER EDUCATION FINANCIAL SERVICES

The Higher Education Financial Services program primarily supports the Citywide Strategic Priority area of *Making Government Work*. The purpose of the Financial Aid Services Program is to provide grant funds to students so that they are better able to finance their post-secondary education.

Key Result Measures:

- Percent of Disbursement requests submitted to OFRM within established timeframes (FY04 target: 80; FY05 target: 85)
- Percent of incoming applications processed within 30 days (FY04 target: 80; FY05 target: 85)

Program 6 – AGENCY MANAGEMENT

The Agency Management Program primarily supports the Citywide Strategic Priority area of *Making Government Work*. The purpose of the Agency Management program is to provide the operational support to the agency so they have the necessary tools to achieve operational and programmatic results.

Key Result Measures:

- Dollars saved by agency-based labor management partnership project(s) (FY04 target: TBD; FY05 target: TBD)
- Percent variance of estimate to actual expenditure (over/under) (FY04 target: 5; FY05 target: 5)
- Cost of Risk (FY04 target: TBD; FY05 target: TBD)
- Rating of 4-5 on all four telephone service quality criteria: 1) Courtesy, 2) Knowledge, 3) Etiquette and 4) Overall Impression (FY04 target: 4; FY05 target: 4)
- Percent of Key Result Measures achieved (FY04 target: 70; FY05 target: 70)

Activity Purpose Statements and Performance Measures

PROGRAM	Policy Research and Analysis
Activity	Policy Research and Analysis
Activity Purpose Statement	The purpose of the Policy Research and Analysis Activity is to provide accessible, reliable and accurate information to citizens and policy makers so they can make well-informed decisions about education in the District.
Services that Comprise the Activity	Standardizing Data/Data Dictionary Website Information/Pages Studies/Publications/Research Monographs In-house Research/Analysis Contracted/Outsourced Research/Analysis Existing Resources/Links Uniform Funding Formula Recommendations Residency Verification Rules Enrollment Count Audit and Report Answered Inquires: Public Ad-Hoc Reports Dialogue Meetings/Convening New Program Transition Plans
Activity Performance Measures	<p>Results: (<i>Key Result Measures Italicized</i>) <i>85% of policy makers/key stakeholders/members of the public reporting they received the information that they wanted/needed (FY05 target: 90)</i> 85% of people (public, parents, and inquirers) surveyed indicating awareness information of SEO and local school system.</p> <p>Outputs: 10 of convened meetings held. 3 of ad-hoc reports completed. # of publications distributed (hard copies) 1 of research studies commissioned 3 of publications distributed (electronic copies)</p> <p>Demand: # of ad-hoc report requests anticipated. # of requests for copies of reports expected. # of meetings expected to be convened.</p> <p>Efficiency: \$ cost per publication distributed (hard and electronic copies) (development cost; or publication/printing cost)</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Jan Holland-Chatman, Director, Policy, Research and Analysis
FY 2005 Budget (Gross Funds)	\$5,476,553
FTE's	16

PROGRAM	Educational Licensing and Certification
Activity	Educational Licensing and Certification
Activity Purpose Statement	The purpose of the Educational Licensing and Certification Activity is to provide regulatory compliance services to non-public educational institutions and residents of D.C. so that educational intuitions are legally enabled to meet the educational needs and requirements of D.C. residents.
Services that Comprise the Activity	New Operating Licenses License Renewals Application Packets Reviewed/Processed Applications Approval/Disapproval Letters Site Visits Administered Denial Appeals Complaint Investigations School Closeouts Enforcement Actions Educational Licensure Commission Support Conditional Exemptions (congressionally-chartered intuitions) Private Primary/Secondary School Report Reviews Private Primary/Secondary School Complaint Investigations
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i> 85% of new license applications reviewed and responded to within 3 weeks (FY05 target: 85) 90% of complaints responded to within 48 hours (FY05 target: 95) 75% of complaints resolved within 90 days.</p> <p>Outputs: 7 new licenses issued 60 site visits conducted. 30 renewal licenses issued 20 complaints processed. 250 school close-out transcripts issued. 2 enforcement actions completed.</p> <p>Demand: 12 new license applications expected. 80 licensees subject to regulation. 20 complaints expected.</p> <p>Efficiency: \$ cost per existing licensee regulated \$ cost per new license application processed.</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Rolin Sidwell, Director, Educational Licensure
FY 2005 Budget (Gross Funds)	\$997,739
FTE's	6

PROGRAM	Customer Services
Activity	Customer Services
Activity Purpose Statement	The purpose of the Customer Services activity is to provide responses to inquiries, targeted outreach, information and marketing services to citizens of the District of Columbia so that they can increase their awareness of programs and services with high levels of customer satisfaction.
Services that Comprise the Activity	Inquiry Responses: Phone calls E-mails/Web-site Requests Mail Walk-ins Phone call Relays/References Application Packets Web-site Information/Pages/Interactive Services Liaison/Ombudsman Services PSAs, Press Releases, and Public Appearances Scheduled and Ad-hoc Outreach Speeches and Presentations (to schools, churches, CBO's and others) Outreach Events Direct Marketing Materials/Mailings Customer Satisfaction Surveys/Reports Other Internal Administrative/Program Support Services (i.e. loaned staff)
Activity Performance Measures	<p><u>Results:</u> <i>(Key Result Measures Italicized)</i> 75% of front-line customer contacts rated at the highest level (FY05 target: 80) 75% of citizens satisfied with the availability of information concerning SEO (FY05 target: 80) % of requests/inquiries acknowledged/answered within 48 hours % of high school/college students aware of all D.C. financial aid opportunities administered by SEO available to them % of households aware of all nutrition programs administered by SEO available to them</p> <p><u>Outputs:</u> # of customer inquiries responded to: Phone calls E-mails/Web-site requests Mail Walk-ins # of applications distributed/downloaded # of direct marketing materials mailed # of public presentations made</p> <p><u>Demand:</u> # of customer inquiries anticipated # of high school seniors in DC schools # of DC residents at or under the age of 18</p> <p><u>Efficiency:</u> \$ cost per customer served</p>

Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Leonard Proctor, Director, Customer Services and Tuition Assistance Grants
FY 2005 Budget (Gross Funds)	\$898,589
FTE's	9

PROGRAM	Nutrition Services
Activity	Nutrition Services
Activity Purpose Statement	The purpose of the Nutrition Services Activity is to provide federal funding, compliance monitoring, technical assistance/training, and outreach/marketing information to District public, private, and non-profit institutions and other organizations so that nutritional meals are provided to all eligible children and other recipients.
Services that Comprise the Activity	Reviewed Applications Pre-Award Site Visits Approved Agreements Processed Claims Payments for Reimbursable Meals Training Sessions/Courses Technical Assistance Contacts Oversight/Monitoring Site Visits and Reports Administrative/Compliance Reviews Federal Audit Assistance Ordered/Distributed Food Commodities Outreach/Marketing Meetings, Fairs, Press Releases, PSAs, and Direct Mailings Nutrition Information
Activity Performance Measures	<p>Results: (<i>Key Result Measures Italicized</i>) 75% of eligible children participating in nutrition programs/receiving nutrition services (FY05 target: 80) 80% of provider organizations in compliance with USDA quality requirements for meal services 80% of provider organizations in compliance with applicable administrative, program, and financial regulations/requirements 100% of claims for reimbursable meals paid within 45 days</p> <p>Outputs: 162 applications/agreements processed 1754 claims paid 200 technical assistance/training contacts made 80 site visits conducted 54 administrative reviews completed 60 workshops/seminars/events conducted 20 people reached through direct marketing efforts 20M meals served: summer feeding services national school lunch/breakfast services child and adult care services</p> <p>Demand: TBD# of individuals eligible for nutrition services: children others TBD# of services providers</p> <p>Efficiency: \$ administrative cost per claim processed \$ administrative cost per agreement processed</p>

Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Cynthia Bell, Director, Nutrition Services
FY 2005 Budget (Gross Funds)	\$31,804,902
FTE's	11

PROGRAM	Higher Education Financial Aid Services
Activity	Higher Education Financial Aid Services
Activity Purpose Statement	The purpose of the Financial Aid Services Activity is to provide grant funds to students so that they are better able to finance their post-secondary education.
Services that Comprise the Activity	Processed Applications Application Assistance Awarded Need-based (adoptee, L.E.A.P., T.A.P.I.T. grants) Awarded No-need Grants (T.A.G.) Contracted College Courses (for inmates) Professional Development Grants – (Eisenhower Grants to colleges for Math and Science teachers) ACT Exams Higher Education Statistical Reports (I.P.E.D.S.) Defaulted Loan Fund Collections
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i></p> <p>% of applicants initially responded to within 15 days % of applicants receiving an award/denial letter within established timeframes. <i>80% of awarded grants paid within established timeframes (FY05 target: 85)</i> <i>80% of available grant funds awarded (FY05 target: 85)</i> % of applicants receiving an award</p> <p>Outputs:</p> <p># of applications processed # of grants awarded: LEAP TAG TAPIT Eisenhower Adoption Corrections</p> <p>Demand:</p> <p># of grant applications expected to be received # of D.C. residents eligible for grant funds</p> <p>Efficiency:</p> <p>\$ administrative cost per application processed</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Ulysses Glee, Director, Higher Education Financial Services
FY 2005 Budget (Gross Funds)	\$32,097,924
FTE's	12

PROGRAM	Agency Management
Activity	Personnel
Activity Purpose Statement	The purpose of the personnel activity is to provide human resources services to department management so they can hire, manage, and retain a qualified and diverse workforce.
Services that Comprise the Activity	Workforce Plans Candidate Selection Recommendations Recruitment Plans Job Postings Job Analyses and Classification Personnel Policy Interpretations Personnel Policy Recommendations Legal and Regulatory Interpretations Personnel Policy and Procedure Updates Employee Complaint/Grievance Investigation Reports Grievance Hearings Employee Interviews Benefit Consultations Employee Inquiry Responses Organization Development Facilitations and Consultations Other
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i> 2% <u>SEO's</u> vacancy rate <u>SEO's</u> vacancy rate will be calculated quarterly. The formula to calculate= # of vacant authorized <u>SEO's</u> positions/# of authorized <u>SEO</u> positions.] 5% reduction in <u>SEO's</u> employee turnover rate as compared with FY 2003 baseline data. <u>SEO</u> had a ____% turnover rate in FY03] Formula to calculate data = <u># of CFT and TFT SEO's employees who leave the agency within a fiscal year</u> / # of CFT and TFT <u>SEO's</u> employees authorized in the fiscal year % of workforce plan commitments met</p> <p>Outputs: # of employees (FTEs) supported # of exit interviews conducted # of budgeted positions filled # of workforce action plan actions completed on time # employee complaint investigation reports completed</p> <p>Demand: # of authorized FTE positions in <u>SEO's</u> budget # of workforce plan actions anticipated</p> <p>Efficiency: Ratio of HR staff to total personnel (FTEs) HR cost as a % of HR budget</p>

	Total personnel costs per FTE
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$73,568
FTE's	1

PROGRAM	Agency Management
Activity	Training and Employee Development
Activity Purpose Statement	The purpose of the training and employee development activity is to provide training and career development services to department staff so they can maintain/increase their qualifications and skills.
Services that Comprise the Activity	Training Classes, Seminars and Workshops Occupational Certification Sessions Computer-based Training Sessions Tracking System Internal Educational Consulting Sessions Employee Handbooks Training Assessments Program Management (Special Programs) Other
Activity Performance Measures	<p><u>Results:</u> <i>(Key Result Measures Italicized)</i></p> <p>70% of training session participants report they learned new skills they can use on the job</p> <p>70% of all training requests fulfilled within six (6) months</p> <p>10% increase of employees who receive occupational-related certification as compared with FY 2002 baseline data</p> <p>55% of <u>SEO's</u> personnel receive training and cross-training to increase internal capacity</p> <p>75% of new hires trained in customer service within the first 90 days of employment</p> <p><u>Outputs:</u></p> <p># of participant training days</p> <p># of employees trained</p> <p><u>Demand:</u></p> <p># of training applications expected</p> <p><u>Efficiency:</u></p> <p>\$ per training day for "no-shows"</p> <p>Total training cost per training participant day</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$129,768
FTE's	1

PROGRAM	Agency Management
Activity	Labor Management Partnership
Activity Purpose Statement	The purpose of the labor management partnership activity is to create a structure in which [Agency] can proactively and collaboratively resolve workplace issues.
Services that Comprise the Activity	Labor-Management partnership action plans Labor-Management partnership best practices L-M Partnership Communication/Promotional materials (e.g. newsletter) Other
Activity Performance Measures	<p><u>Results:</u> <i>(Key Result Measures Italicized)</i> <i>\$\$ saved by agency-based labor management partnership project(s) (FY04 target: TBD; FY05 target: TBD)</i></p> <p><u>Outputs:</u> # of agency partnerships # of agency partnership projects completed # of planned training programs delivered</p> <p><u>Demand:</u> # of agency administrations and or bargaining units (partnership opportunities) # of agency partnership projects initiated or ongoing from prior year(s) # of training programs planned</p> <p><u>Efficiency:</u> \$ per agency partnership formed \$ per agency partnership project completed \$ per training program delivered</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$64,330
FTE's	.25

PROGRAM	Agency Management
Activity	Contracting and Procurement
Activity Purpose Statement	The purpose of the contracting and procurement activity is to provide contracts management, purchasing, and technical assistance to department management and staff so they can obtain the services and commodities they need within budget, on time, and according to customer specifications.
Services that Comprise the Activity	Contract Preparation, Administration, Monitoring and Compliance Bid Requests/Recommendations Change Orders Technical Assistance Purchase Reports Other
Activity Performance Measures	<p><u>Results:</u> <i>(Key Result Measures Italicized)</i> 80% of completed purchase requisitions under \$100,000 will result in purchase orders within 14 business days 50% of completed purchase requisitions over \$100,000 will result in purchase orders within 120 calendar days</p> <p><u>Outputs:</u> # of purchase orders under \$100,000 processed # of purchase orders over \$100,000 processed</p> <p><u>Demand:</u> # completed purchase requisitions received</p> <p><u>Efficiency:</u> Purchasing cost per procurement dollar handled</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$73,568
FTE's	1

PROGRAM	Agency Management
Activity	Property Management
Activity Purpose Statement	The purpose of the facility support activity is to provide real estate and facility services to agencies to meet their real estate/facility needs so they can meet their programmatic goals to <u>SEO's</u> staff a timely, efficient, and effective manner in keeping with current District operations, industry standards and best practices.
Services that Comprise the Activity	Strategic planning Site Acquisition Lease Negotiations Lease management Lease administration Space planning Space Allocations Utility Management Fixed Cost Projections Security Services Emergency Response Relocation Support Facility Services Contract Management Postal Capital Construction Parking Services Facility Coordination Furniture Relocations Recycling Services Other
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i></p> <p>% of changes in real estate requirements filed with OPM with at least six months notice</p> <p>% of facility improvement projects in <u>SEO's</u> facilities will be completed on time and on budget .</p> <p>% of solid waste consisting of recyclable materials</p> <p>% of agency materials/supplies consisting of recycled content</p> <p>Output:</p> <p># Change orders for real estate requirements</p> <p># facility improvement projects</p> <p># tons/pounds of recyclable materials</p> <p># tons/pounds of non-recyclable solid waste</p> <p>\$ value of recycled materials/supplies purchased</p> <p>\$ value of ALL materials/supplies purchased</p> <p>Demand:</p> <p># Change orders anticipated for real estate requirements</p> <p># anticipated facility improvement projects</p> <p># tons/pounds anticipated of recyclable solid waste</p> <p># tons/pounds anticipated of non-recyclable solid waste</p> <p>\$ value of anticipated recycled materials/supplies to be purchased</p>

	\$ value of anticipated ALL materials/supplies to be purchased <u>Efficiency:</u> \$ amount of internal support costs per employee (agency-wide)
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$340,430
FTE's	.5

PROGRAM	Agency Management
Activity	Information Technology
Activity Purpose Statement	The purpose of the information technology activity is to provide network, telephone, and computer hardware and software support and information services to department management and staff so they can use technologies to produce, communicate, and manage information without undue delay.
Services that Comprise the Activity	Computer Installation, Repair, Upgrades and Preventative Maintenance Service Calls Computer Hardware/Software Support Programming LAN Maintenance Software Licenses and Upgrades Long Range Information Systems Plans Telephone Voice Mail Accounts Telephone Service Repairs Website Hosting and Management Email Accounts Other
Activity Performance Measures (Target & Measure)	<p>Results: <i>(Key Result Measures Italicized)</i></p> <p>75% of service requests responded to within 2 business days</p> <p>Outputs: # of workstations supported # of service call responses handled # of technological solutions implemented</p> <p>Demand: # of users # of <u>SEO's</u> activities</p> <p>Efficiency: Information technology support costs per workstation \$ per technological solution implemented</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$129,768
FTE's	1

PROGRAM	Agency Management
Activity	Financial Services
Activity Purpose Statement	The purpose of the financial services activity is to provide financial and budgetary information to department program/administrative units in order to ensure the appropriate collection/allocation, utilization and control of city resources.
Services that Comprise the Activity	Agency Budget (Operating and Capital Grants, intra-District) Development and Monitoring Revenue and Expenditures Tracking Reports Revenue and Expenditure Estimates (FRP) Annual Financial Report Capital Project/Grant Closeouts Grant Management/Allocations Budget Variance Analyses Budget Change Requests Fund Certifications Activity Management Other
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i> <5% variance of estimate to actual expenditure (FY05 target: 5) 5% variance of estimate to actual revenue 10% expenditure variance by program agency wide 90% of <u>SEO's</u> program managers who stay within their fiscal year budget 90% of external audit findings resolved within 60 calendar days 70% of internal audit findings resolved within 90 calendar days</p> <p>Outputs: # of monthly reports sent to program managers within established timeframes # of capital projects closed # of grants billed</p> <p>Demand: # of new capital projects authorized # of operating programs authorized</p> <p>Efficiency: Total department budget per dollar of financial monitoring expense</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$284,768 + (\$110,066 – AFO program) ²
FTE's	1 + (2 – AFO program)

² The Agency Financial Operations (AFO) program was developed during the FY 2005 budget process to identify the costs associated with providing comprehensive and efficient financial management services to and on behalf of District agencies. The AFO program includes the funding and FTE count for all Office of the Chief Financial Officer FTEs assigned to Performance-Based Budgeting (PBB) District agencies. While the costs of this program are separately budgeted, the Agency Strategic Business Plans have not yet been updated to include Activity Purpose Statements for the three activities in the AFO program: (1) Budget Operations, (2) Accounting Operations, and (3) Associate Chief Financial Officer. The plans will be updated accordingly in the future; in the interim, these costs are being highlighted in the Financial Services activity of the Agency Management program.

PROGRAM	Agency Management
Activity	Risk Management
Activity Purpose Statement	The purpose of the risk management activity is to provide risk mitigation strategies and services to <u>SEO</u> and its employees so they can avoid exposure to risks and reduce the likelihood of injury and related costs.
Services that Comprise the Activity	Risk Assessments Risk Mitigation Plans Risk Reduction Policies Incident Analyses Risk Mitigation Plan Audits Other
Activity Performance Measures	<p><u>Results:</u> <i>(Key Result Measures Italicized)</i> <i>Cost of Risk (FY04 target: TBD; FY05 target: TBD)</i> 10% reduction of employees injured receiving medical attention as compared with FY 2003 baseline data 10% reduction in the number of vehicle-related accident claims as compared with FY 2003 baseline data</p> <p><u>Outputs:</u> # of logged medical attention injury reports # of medical attention injury reports investigated 2 risk assessments completed</p> <p><u>Demand:</u> 2 risk assessments</p> <p><u>Efficiency:</u> \$ per incident investigated</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$95,509
FTE's	.5

PROGRAM	Agency Management
Activity	Legal Services
Activity Purpose Statement	The purpose of the legal services activity is to provide legal advice, review, and support to <u>SEO's</u> staff so they can ensure that the services provided by <u>SEO</u> are consistent with D.C. and federal laws, rules, and regulations.
Services that Comprise the Activity	Legal Sufficiency Reviews Statutory & Regulatory Interpretations Audits Claims Reviews Legal Opinions Copies of Laws & Regulations Regulation Drafts Contract Reviews Consultations Research Opinions Liaisons to Office of Corporation Council (OCC) Other
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i></p> <p>90% of requests for legal advice/review responded to within established timeframes (due dates vary on a case by case basis). 90% of claims and lawsuits responded to within 30 business days of receipt 95% of FOIA requests responded to within 10 business days of receipt 70% of employee grievances and discrimination complaints resolved without administrative litigation % of agency actions (hearing appearances, reports filed, etc) required by court order met within agreed timetables³</p> <p>Outputs:</p> <p># of requests for legal advice/review responded to # of claims/lawsuits/FOIA requests responded to # of employee grievances and discrimination complaints resolved # of amendments to laws, rules, regulations, and policies drafted, reviewed, and finalized</p> <p>Demand:</p> <p># of citizen/vendor claims and lawsuits anticipated</p> <p>Efficiency:</p> <p>\$ cost per citizen/vendor claim paid</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Jan Holland-Chatman, Director, Policy, Research and Analysis
FY 2005 Budget (Gross Funds)	\$129,768
FTE's	1

³ To be measured by the Office of Corporation Counsel and the Office of Risk Management

PROGRAM	Agency Management
Activity	Fleet Management
Activity Purpose Statement	The purpose of the fleet management activity is to provide new and replacement vehicle and equipment services, requested repair services, preventive and preparatory equipment maintenance services, and fuel, lubricant, and parts services to <u>SEO</u> and other designated agencies so they can have the appropriate equipment/vehicles required to deliver timely and efficient services, can have safe, working vehicles in a timely manner, can have safe and reliable vehicles that are able to do the job, and can operate their vehicles/equipment required to deliver timely and efficient services.
Services that Comprise the Activity	Preventive Maintenance Schedules (PMs) Bid Requests Motor Pool Cars Long Term Vehicle Leases Vehicle Rentals Other
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i></p> <p>90% of mission critical fleet within useful life cycle (based on industry standards)</p> <p>90% of vehicle/equipment orders processed by Fleet Management within 72 hours</p> <p>90% of agencies satisfied with purchase/lease services</p> <p>75% of vehicles meeting government alternative fuel requirements</p> <p>98% of mission critical fleet available for daily operations</p> <p>90% of scheduled preventive maintenance (PM) completed monthly</p> <p>Outputs:</p> <p># of replacement vehicles purchased</p> <p># of new vehicles purchased</p> <p># of vehicles leased/rented</p> <p># of completed PMs</p> <p>Demand:</p> <p># of vehicle purchases/leases anticipated in the replacement schedule</p> <p># of anticipated scheduled PMs</p> <p># of anticipated scheduled preparation</p> <p># of vehicles in the fleet</p> <p>Efficiency:</p> <p>\$ per vehicle purchased</p> <p>\$ per PM by vehicle class</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Managers	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$78,380
FTE's	.25

PROGRAM	Agency Management
Activity	Communications
Activity Purpose Statement	The purpose of the communications activity is to provide regular program communication services to <u>SEO's employees</u> so they can have the knowledge and information they need to be effective in their jobs; and departmental information to the media, community associations, residents, and elected officials to increase public awareness of departmental programs, issues and challenges.
Services that Comprise the Activity	Newsletters Informational Bulletins Informational Meetings New Employee Packages Internal Council/Forum Sessions/Meetings Media Request Responses Promotional Campaigns Posters, Brochures, and Newsletters Supported Special Events Speaking Engagements Media Outreach Services Website Content Workshops School Curricula School Patrols Freedom of Information Act (FOIA) Reports Congressional Inquiry Responses Council Inquiry Responses Other
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i> 85% of media articles relating to <u>(agency)</u> are favorable (estimate will be based on PIO log rather than on monitoring service report)</p> <p>Outputs: # employee information pieces produced for distribution # of media requests handled # speaking engagements delivered</p> <p>Demand: # [Agency] employees # annual outreach campaigns # media requests</p> <p>Efficiency: \$ per inquiry response \$ per informational piece developed \$ per media request handled</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Leonard Proctor, Director, Customer Services and Tuition Assistance Grants
FY 2005 Budget (Gross Funds)	\$129,768
FTE's	.5

PROGRAM	Agency Management
Activity	Customer Service⁴
Activity Purpose Statement	The purpose of the customer service activity is to implement the District's customer service standards so that customers can access and receive SEO's services in a satisfactory professional, responsible and timely manner.
Services that Comprise the Activity	<p>Telephone number Verifications Performance Data and Trend Analysis Reports Internal Quality Assurance Monitoring Services Agency Call Center Responses (Where Applicable) Agency Call Center Intakes (Where Applicable) Acknowledgment Letters to Constituents Letter Routing and Tracking Services Customer Service Technology System Installations Customer Service Technology System Training Sessions Customer Service Business Partner Sessions Customer Service Information Reference Materials Customer Service Public Service Announcements Service Delivery Schedules Customer Service Awards and Acknowledgements Agency-specific Customer Surveys</p>
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i> <i>Rating of 4-5 on all four telephone service quality criteria</i> 1) <i>Courtesy</i>, 2) <i>Knowledge</i>, 3) <i>Etiquette</i> and 4) <i>Overall Impression</i> (FY04 target: 4; FY05 target: 4) % of Telephone calls returned within 48 hours % of Calls to Agency Call Center answered within 2.5 minutes (where applicable) % of Voice Mail Boxes with appropriate greeting % ALL Correspondence acknowledged within 48 hours % Correspondence to Mayor acknowledged within 48 hours % US Mail Correspondence to agency acknowledged within 48 hours % E-Mail Correspondence to agency acknowledged within 48 hours % of ALL Correspondence resolved within timeframe committed % of Correspondence to Mayor resolved within timeframe committed % of US Mail Correspondence to agency resolved within timeframe committed % of E-Mail Correspondence to agency resolved within timeframe committed % of eligible agency employees who receive customer service training</p> <p>Outputs: # calls to agency call center (where applicable) # of letters and e-mail to the Mayor routed to [Agency] # of letters and e-mail received directly by agency # of performance/trend reports # of agency employees trained in customer service</p> <p>Demand: # calls to agency call center (where applicable) anticipated</p>

⁴ See http://dc.gov/mayor/customer_service/index.shtm for details on the District's Customer Service Standards

	# of letters and e-mail to the Mayor routed to [Agency] anticipated # of letters and e-mail received directly by agency anticipated # of performance/trend reports anticipated # of agency employees eligible to be trained in customer service <u>Efficiency:</u> \$ per call to agency call center (where applicable) \$ per response to letter/email
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$93,427
FTE's	.5

PROGRAM	Agency Management
Activity	Performance Management
Activity Purpose Statement	The purpose of the Performance Management activity is to provide performance reporting and evaluation services to the Mayor, Council, Congress and the general public so they can assess the extent to which District agencies achieve their strategic goals and performance targets.
Services that Comprise the Activity	Agency Strategic Business Plans (Biennial) Performance Contracts (Annual) Monthly Performance Reports Performance Accountability Plans (Incorporated Into Budget) Performance Accountability Reports to Council Scorecards Neighborhood Cluster Database
Activity Performance Measures	<p>Results: <i>(Key Result Measures Italicized)</i> <i>70% of Key Result Measures Achieved</i> (FY05 target: 70) N/A Neighborhood Cluster Database commitments achieved 95% of FY 2003 Performance Evaluations of PMP-eligible employees conducted 95% of FY 2004 Individual Performance Plans developed for PMP-eligible employees completed</p> <p>Outputs: 12 monthly performance reports 4 quarterly Scorecard updates 12 performance evaluations of PMP-eligible employees conducted 12 Individual Performance Plans developed for PMP-eligible employees</p> <p>Demand: 12 monthly performance reports 4 quarterly Scorecard updates 12 PMP-eligible employees due for FY 2003 evaluations 12 PMP-eligible employees on staff in FY 2004</p> <p>Efficiency: \$ per monthly report \$ per performance evaluation \$ per individual performance plan \$ per scorecard</p>
Responsible Program Manager	Deborah A. Gist, Interim State Education Officer
Responsible Activity Manager	Keith Canty, Director of Operations
FY 2005 Budget (Gross Funds)	\$95,509
FTE's	.5